

CMS Net

Follow Up Module

TABLE OF CONTENTS

Table of Contents	2
<i>Follow Up Module</i>	5
Follow Up Module	5
Follow Up Module is Broken Down into Four Parts:	5
Manual Sections:	5
Common Keys & Functions	5
<i>Section 1: Enter New Follow Up Request</i>	6
Enter New Follow Up Request	6
To Access Follow Up	6
To Enter New Follow Up Request	7
Identify Patient	8
Follow Up Request Screen	9
Field Descriptions	10
Add New User to the Request Follow Up to Field	12
Add New User to Notification to Field	13
Action Menu	14
Branch Menu	15
<i>Section 2: Respond to Follow Up Requests</i>	16
As the Responder	16
To Access Respond to Follow Up Requests	16
To Respond to Follow Up Requests by Patient	17
Identify Patient	18
Search Results Explanation	20
Follow Up Response Screen	21
Field Description	22
Follow Up Comments Box	24
Data Entry as the Follow Up By User	25
Note	25
Notification To User	26
Data Entry as the Notification To User	26
To Respond to Follow Up Request: Action Req'd by Dt	27
Follow Up-Dates Screen	29
To Respond to Follow Up Request: As Responder	32
To Respond to Follow Up Request: Request From	35
User Identification Screen	37
Action Menu	40
Branch Menu	41
If Not Finish with Request	42
To Restore Request Back in Respond to Follow Up Request (Pending Status)	42
<i>Section 3: To Edit Follow Up Requests and Responses: As Requestor</i>	43
Edit Follow Up Requests and Responses: As Requestor	43
As the Requestor	43
Requestor Can Edit Following Fields:	43
To Access Edit Follow Up Requests and Responses	44
To Edit Follow Up Requests and Responses: As Requestor	45
Follow Up Request Screen	48
Follow Up Response Screen	49
To Add New User to Follow Up by Field or Notification to Field	51

To Delete User to Follow Up by Field or Notification to Field	51
To Edit Follow Up Requests and Responses: By Patient > As Requestor	53
Identify Patient	54
Search Results	55
Follow Up Response Screen	57
To Edit Follow Up Requests and Responses: By Action Req'd By Dt > As Requestor	58
Follow Up-Dates Screen	59
Follow Up Request Screen	61
Follow Up Request Screen	62
Follow Up Request Branch Menu	64
Branch Menu	64
Completing a Follow Up Request	65
To Complete a Follow Up Request	66
Auto Generated Narrative	66
Deleting a Follow Up Request	67
To Delete a Follow Up Request	67
Deleting a Request Will Send the Request to Follow Up History	67
Auto Generated Narrative	67
Section 4: Edit Follow Up Requests and Responses: As Responder	68
Edit Follow Up Requests and Responses: As Responder	68
As the Responder	68
Responder's editable fields:	68
To Edit Follow Up Requests and Responses: As Responder	69
Edit Follow Up Requests and Responses Select Option	71
To Edit Follow Up Requests and Responses: By Patient > As Responder	74
Identify Patient	75
Follow Up Response Screen	77
To Edit Follow Up Requests and Responses: By Action Req'd By Dt > As Responder	78
Follow Up-Dates Screen	79
Follow Up Response Branch Menu	82
If Not Finish with Request	83
To Restore Request to Respond to Follow Up Requests	83
Section 5: Follow Up History	84
Follow Up History	84
View Only	84
To Access Follow Up History	84
Follow Up History Select Option	86
To Access Follow Up History: As Requestor	87
Follow Up Comments Box	89
Follow Up Response Comments Box	90
To Access Follow Up History: As Responder	92
Follow Up Comments Box	94
Follow Up Response Comments Box	95
To Access Follow Up History: By Patient > As Requestor	96
To Access Follow Up History: By Patient > As Responder	97
Identify Patient	98
Follow Up Comments Box	100
Follow Up Response Comments Box	101
To Access Follow Up History: By Action Req'd By Dt > As Requestor	102
To Access Follow Up History: By Action Req'd By Dt > As Responder	103
Follow Up-Dates Screen	104

Follow Up Comments Box	106
Follow Up Response Comments Box	107
Action Menu	108
Follow Up History Branch Menu	109

Follow Up Module

Follow Up Module

The Follow Up Module was designed to provide users with an automated mechanism to notify another county user an action is required on a client's record. The Follow-Up Module encompasses creating requests for follow-up, posting follow up responses, posting pending follow up notifications and displaying historical follow up completed requests.

This module will allow users to search, post, edit, delete, transfer and track a follow up notification on any record for their county. Users will only be able to see and work with follow ups assigned to them. In addition, this will allow a single requestor to post the same notification for multiple users.

Follow Up Module is Broken Down into Four Parts:

Follow Up Module is broken down into four parts:

- Edit Follow Up Requests and Responses
 - Enter New Follow Up Requests
 - Follow Up History
 - Respond to Follow Up Requests
-

Manual Sections:

To better understand the Follow Up Module, this manual consists of five sections:
Section 1: Enter New Follow Up Request
Section 2: Respond to Follow Up Requests
Section 3: Edit Follow Up Requests and Responses: As Requestor
Section 4: Edit Follow Up Requests and Responses: As Responder
Section 5: Follow Up History

Common Keys & Functions The following is a chart displaying the common keys and functions.

Key(s)	Functions
Down arrow / Up arrow	Moves cursor to next / previous field
Action Menu Key (PC = F2, T = F11)	Allows user to save or cancel entries
Help Key (PC = F1, T = F13)	Gives help message or pick list.
Cancel Key (PC = Shift F2, T = F12)	Allows the user to cancel entry from any screen.

Section 1: Enter New Follow Up Request

Enter New Follow Up Request To create a follow up request to notify users that a follow up action requirement has been place on a client's record; users must first create a request under the *Enter New Follow Up Request*.

To Access Follow Up

Step	Action
1	Type "F" for Follow Up from the Primary Option
2	Press <Enter>

PRIMARY OPTION
<p>Select Option:</p> <p>CHANGE ACCESS CODE DISPLAY ELIGIBILITY LOG ELECTRONIC POST-IT NOTE ELIGIBILITY EVENT TRACKING ... >FOLLOW UP ... GENERATE REQUESTS/AUTHORIZATIONS ... MailMan Menu ... MEDICAL THERAPY PROGRAM ... REGISTRATION ... SYSTEM MAINTENANCE ...</p> <hr/> <p>[Quit]</p>

To Enter New Follow Up Request

Step	Action
3	Type "EN" for Enter New Follow Up Request
4	Press <Enter>

FOLLOW UP
<p>Select Option:</p> <p>Edit Follow Up Requests and Responses</p> <p>>Enter New Follow Up Request</p> <p>Follow Up History</p> <p>Respond to Follow Up Requests</p> <hr/> <p>[Quit]</p>

Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

Select Patient:		-20
() PIE,CHERRY		Gender: F DOB: 03/01/2002
CCS#: 3860903 CIN: 37431741A 4		Legal County: SACRAMENTO
Reg=ACT Med=E F/R=E Pgrm End Dt:		CCS Elig Stat: 9K CCS
[Quit]		

CCS Number :			
Pt Name :	<input type="text" value="PIE,CHERRY"/>	Birthdate :	
Current Legal County:		Gender :	
Client Index Number :			
Social Security Number :			

For instructions on identifying patient, see the Patient ID section of this manual.

Follow Up Request Screen After identifying a patient, the Follow Up Request Screen appears:

CMSAT	FOLLOW UP REQUEST	CMSFU-10
Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4 Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E		
Request Date: 03/01/2007 Follow Up ID: 0307-000018 Status: PENDING Requestor: FOLLOW UP,USER ONE Action Required By: Priority: ROUTINE		
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:		
Subject: Comments: Request Follow Up to: Notification to: Last Update By: Date:		

Field Descriptions The following table describes data entry fields on the Follow Up Request Screen.

Element Name	Descriptions/Comments
Patient Header	Defaulted from Patient Registration Face Sheet
Request Date	Defaults to today's date. Auto-populate date.
Follow Up ID	Auto-populates number. Number derived by: Month, Year – auto-calculate six digit number MMY-999999
Status	<p>The status of the follow up request: Pending, Complete, No Action. Default to pending.</p> <ul style="list-style-type: none"> • The request status will default to No Action if the patient's record is closed, denied or not opened. • If status is changed to Complete the follow up will display on the Follow Up History screen. • Cannot select Complete status unless all Action Taken Dt fields are complete on the Follow Up Response Screen. • If a record has a pending request and consequently closes, denies or becomes not open status all pending requests will be posted to history with No Action status.
Requestor	The user generating the request. Default to user logged in
Action Req'd by	The date the request should be acted on by. This date must be completed by the requestor. Date cannot be past date or before the request date.
Priority	The priority of the request and will default to Routine. Acceptable values can be Routine or Urgent.
Primary Addressee	Defaults from the Patient Registration table
Patient Contact Phone	Patient's Contact Phone Number. Display data from the Primary Phone Number field listed in Patient Registration Face Sheet.
Other Phone	Patient's Other Phone Number
Provider	Provider Associated to the patient. Select from pick list, <F1> or by typing in the last name, first name of provider. No spaces. Maximum of one provider
Telephone	Provider Telephone number. Auto display if provider is picked.
Subject	A brief free form text description required for follow up request and automatically saves as a General Topic for Follow Up.
Comments	The full free text description of the requirement on the record. Automatically saves to narrative for Follow Up.

Request Follow Up to	<p>The individual required to take action on the request. Select from pick list, <F1> or by typing in the last name, first name of user. No spaces. Most list a minimum of one (1).</p> <ul style="list-style-type: none"> • Requestor can delete individuals or add individuals at any point if that individual has not taken action on request. • If added or deleted, the associated notification will be added or deleted in Follow Up Response Screen, Follow Up Requests Screen and Follow Up History Screen.
Notification to	The individual to be notified of the pending action. Select from pick list, <F1> or by typing in the last name, first name of user. No spaces.
Last Updated by	Defaults to user's name that last updated record
Date	Date is populated after the request has been saved. The system will update the date to reflect today's dates if the record has been changed. Format: MM/DD/YYYY.

Add New User to the Request Follow Up to Field

Step	Action
1	Arrow down to the Request Follow Up to Field
2	Use <F1> or type last name and first name of user
3	Press <Enter>
4	To add more users' name, repeat step 2 and step 3
5	When done press <Enter> to move to the next field

Select One: FOLLOW UP,USER FIVE FOLLOW UP,USER FOUR FOLLOW UP,USER ONE FOLLOW UP,USER THREE FOLLOW UP,USER TWO [Quit]	FOLLOW UP REQUEST CMSFU-10 CCS#: 3860903 CIN: 37431741A 4 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E Follow Up ID: 0307-000019 Status: PENDING ONE /2007 Priority: ROUTINE
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Request Follow Up to: FOLLOW UP,USER THREE foll	
Notification to:	
Last Update By: Date:	

Add New User to Notification to Field

Step	Action
1	Arrow down to the Notification to Field
2	Use <F1> or type last name and first name of user
3	Press <Enter>
4	To add more users' name, repeat step 2 and step 3
5	When done press <Enter>

Select One: FOLLOW UP,USER FIVE >FOLLOW UP,USER FOUR FOLLOW UP,USER ONE FOLLOW UP,USER THREE FOLLOW UP,USER TWO [Quit]	CMSFU-10
FOLLOW UP REQUEST	
CCS#: 3860903 CIN: 37431741A 4 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E	
Follow Up ID: 0307-000019 Status: PENDING ONE /2007 Priority: ROUTINE	
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Request Follow Up to: FOLLOW UP,USER THREE FOLLOW UP,USER TWO	
Notification to: FOLLOW UP,USER FIVE foll	
Last Update By: Date:	

Action Menu When new request is completed, <F2> to bring up action menu.
The Enter New Follow Up Request have five commands:

Select One:— () Save () Delete () Print () Cancel
[Quit]

Command	Action
Save	Select <i>Save</i> from action menu to save data entered. Save will save the record and bring user to the <i>Follow Up Request Branch Menu</i> .
Print	Select <i>Print</i> will take user to the <i>Print Device</i> page to print. <i>Print</i> will bring user to the print device page for printing.
Cancel	Select <i>Cancel</i> will take user back to previous page. <i>Cancel</i> will not save the request but bring user back to the <i>Follow Up Menu</i> .
Quit	Select <i>Quit</i> will take user back to screen. <i>Quit</i> will bring user back to the <i>Follow Up Request</i> screen to continue with data entry.

Branch Menu The system shall send user to the Follow Up Request Branch Menu under the following condition:

- Save is selected from Action Menu
- Print is selected from Action Menu

FOLLOW UP REQUEST BRANCH MENU	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 LGL CO: SACRAMENTO REG= ACTIVE	MED= E F/R= E
<div style="text-align: center;">(?) Narrative for Follow Up Request () Mail Message for Follow Up Request () Follow Up Menu</div>	

Section 2: Respond to Follow Up Requests

Respond to Follow Up Requests The *Respond to Follow Up Requests* display all requests sent to user to take action and also allow user to post response to the request records.

As the Responder Under the *Respond to Follow Up Requests*, user can only respond to pending request. Any request that user had previously responded to will be found under the *Edit Follow Up Requests and Responses*.

To Access Respond to Follow Up Requests

Step	Action
3	Type " R " for Respond to Follow Up Requests
4	Press <Enter>

FOLLOW UP
<p>Select Option:</p> <p>Edit Follow Up Requests and Responses</p> <p>Enter New Follow Up Request</p> <p><u>Follow Up History</u></p> <p><u>>Respond to Follow Up Requests</u></p> <p>[Quit]</p>

After pressing <Enter>, the Respond to Follow Up Requests Select Option appears.

To Respond to Follow Up Requests by Patient

If you know the client's name, you can respond to a follow up request by client search.

Step	Action
1	Select " Patient " from <i>Respond to Follow Up Requests</i>
2	Press <Enter>

Respond to Follow Up Requests

SELECT OPTION

>PATIENT

ACTION REQD BY DT
 AS RESPONDER
 REQUEST FROM
 QUIT

Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

PATIENT IDENTIFICATION FOR: Respond to Follow Up Requests	
Enter one of the following identifiers:	
CCS Number :	
Pt Name :	Birthdate :
Current Legal County :	Gender :
Client Index Number :	
Social Security Number :	

For instructions on identifying patient, see the Patient ID section of this manual.

After identifying a patient, system will display all results by selected client.

() PIE,CHERRY		CCS#: 3860903	
Requestor: PHOMSOPHA,MOLLY		Priority: ROUTINE	
Subject: SCHEDULE APPT			
Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1			
[Quit]			

**Search Results
Explanation**

The “**Resp#:**” field is the total # of users that have responded to requests. For example: Resp#: 3/4 means that three out of four users had responded to the request.

SEARCH RESULTS	
() PIE,CHERRY	CCS#: 3860903
Requestor: PHOMSOPHA,MOLLY	Priority: ROUTINE
Subject: SCHEDULE APPT	
Action Required By: 03/02/2007	Request Date:03/02/2007
	Resp#: 0/1
[Quit]	

Number of user(s) that had responded to request: 0/1 means zero user has responded to request out of one user

**Follow Up
Response Screen**

Select record, Follow Up Response Screen appears:

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		37431741A 4 E F/R= E
[Quit]		NDING
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: _____ Provider: _____ Telephone: _____		
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER TWO		Action Taken Dt: <input type="text"/>
<input type="text"/>		
Notification to: Last Update By: FOLLOW UP,USER ONE		Accepted Dt: <input type="text"/> Date: 03/01/2007

Follow Up Response Screen

This message is from the
requestor, follow up
comments.

Data entry fields

Field Description

Element Name	Descriptions/Comments
Patient Header	Defaulted from Request Follow Up screen
Request Date	Defaults to today's date. Auto-populate date.
Follow Up ID	Auto-populates number. Number derived by: Month, Year – auto-calculate six digit number MMY-999999
Follow Up Status	<p>The status of the follow up request: Pending, Complete, No Action. Default to pending.</p> <ul style="list-style-type: none"> • The request status will default to No Action if the patient's record is closed, denied or not opened. • If status is changed to <i>Complete</i> the follow up will display on the Follow Up History screen. • Cannot select <i>Complete</i> status unless all Action Taken Dt fields are complete on the Follow Up Response Screen. • If a record has a pending request and consequently closes, denies or becomes not open status all pending requests will be posted to history with No Action status.
Requestor	The user generating the request. Default to user logged in.
Action Req'd by	The date the request should be acted on by. This date must be completed by the requestor. Date cannot be past date or before the request date.
Priority	The priority of the request and will default to Routine. Acceptable values can be Routine or Urgent.
Request Follow Up to	<p>The individual required to take action on the request. Select from pick list, <F1> or by typing in the last name, first name of user. No spaces. Must list a minimum of one (1).</p> <ul style="list-style-type: none"> • Requestor can delete individuals or add individuals at any point if that individual has not taken action on request. <p>If added or deleted, the associated notification will be added or deleted in Follow Up Response Screen, Follow Up Requests Screen and Follow Up History Screen.</p>
Primary Addressee	Primary address of client. Defaulted from Request Follow Up screen.
Patient Contact Phone	Patient's Contact Phone Number. Display data from the Primary Phone Number field listed in Patient Registration Face Sheet. Defaulted from Request Follow Up screen
Other Phone	Patient's Other Phone Number. Defaulted from Request Follow Up screen

Provider	Provider Associated to the patient. Select from pick list, <F1> or by typing in the last name, first name of provider. No spaces. Maximum of one provider.
Telephone	Provider Telephone number. Auto display if provider is picked.
Subject	A brief free form text description required for follow up request and automatically saves as a General Topic for Follow Up.
Comments	The full free text description of the requirement on the record. Automatically saves to narrative for Follow Up.
Follow Up by	List individual taking action on the request and default names from Request Follow Up to field.
Action Taken Dt	Date that user took action on request. Fill in the action taken date when done with request to send request to Edit Follow Up Requests and Responses. If not done with request, leave the field blank.
Follow Up Response	The follow up Response taken on a case. This is a free text field and automatically saves to narrative for Follow Up.
Notification To	Only serves as a notification. The only action required, is the entry of the Notification Date indicating user are aware of the request.
Notification Date	Populated by the user listed in the Notification to field when they have viewed the necessary follow up actions required.

Follow Up Response Screen with Follow Up Comments Box

Data Entry as the Follow Up By User Once comments box disappear, system will take user to *Follow Up By* field, at this point user can enter date in *Action Taken Dt* field and post comments to request under the *Follow Up By* field.

CMSAT FOLLOW UP RESPONSE		Select One:
Pt Nm: PIE,CHERRY	CCS#: 386090	(?) Save
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE		() Print
		() Cancel
Request Date: 03/01/2007 Follow Up ID: 0307-000019	Stat	[Quit]
Requestor: FOLLOW UP,USER ONE		
Action Required By: 03/02/2007 Priority: ROUTINE		
Primary Addressee: BERRY	<div style="border: 1px solid black; padding: 10px; text-align: center;"> Data Entry Fields: </div>	
Patient Contact Phone: (916)		
Provider:		
Subject: SCHEDULE APPT		
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO RIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH		
Follow Up By: FOLLOW UP,USER THREE	Action Taken Dt:	03/01/2007
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		
Notification to:	Accepted Dt:	
Last Update By: FOLLOW UP,USER ONE	Date: 03/01/2007	

Note If action on request is not complete and user would like to return to request at a later time to finish, leave the *Action Taken Dt* field blank.

Notification To User If request was sent to user as the *Notification to* person, user can only enter in the accepted date, which is date that he/she accepted the request.

Data Entry as the Notification To User Once comment box disappear, system will take user to *Notification to* field, at this point user can enter in the accepted date in the *Accepted Dt* field.

CMSAT FOLLOW UP RESPONSE		Select One: 0
Pt Nm: PIE,CHERRY	CCS#: 386090	(?) Save
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE		() Print
		() Cancel
Request Date: 03/01/2007 Follow Up ID: 0307-000019 Stat		[Quit]
Requestor: FOLLOW UP,USER ONE		
Action Required By: 03/02/2007 Priority: ROUTINE		
Primary Addressee: BERRY	<div style="border: 2px solid black; padding: 10px; text-align: center;"> Data Entry field for Notification to </div>	
Patient Contact Phone: (916)		
Provider:		
Subject: SCHEDULE APPT		
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECUASE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By:	Action Taken Dt:	
Notification to: FOLLOW UP,USER TWO	Accepted Dt: 03/02/2007	
Last Update By: PHOMSOPHA,MOLLY	Date: 03/02/2007	

To Respond to Follow Up Request: Action Req'd by Dt User can also respond to follow up request by action required by date.

Step	Action
1	Type " R " for Respond to Follow Up Requests from Follow Up
2	Press <Enter>

FOLLOW UP
<p>Select Option:</p> <p>Edit Follow Up Requests and Responses</p> <p>Enter New Follow Up Request</p> <p>Follow Up History</p> <p>>Respond to Follow Up Requests</p> <hr/> <p>[Quit]</p>

Step	Action
3	Type "AC" for Action Req'd by Dt.
4	Press <Enter>

Respond to Follow Up Requests

SELECT OPTION

PATIENT

>ACTION REQ'D BY DT

AS RESPONDER

REQUEST FROM

QUIT

**Follow Up-
Dates Screen**

After pressing <Enter>, the Follow Up- Dates Screen will appear:

Step	Action
1	Enter the date range " From " and " To " date.
2	Press <Enter>
3	Select " Search " from the Action Menu
4	Search Results display by date range

FOLLOW UP - DATES

View follow up records within the following date range:

Date Range - From: 03/02/2007 To: 03/02/2007

Date Range

Select One:

☐ Search

☐ Cancel

[Quit]

Step	Action
4	Select Client's Record
5	Press <Enter>

Respond to Follow Up Requests		-50
() LIBRE,NACHO	CCS#: 3860902	
Requestor: PHOMSOPHA,MOLLY	Priority: ROUTINE	
Subject: SCHEDULE APPT		
Action Required By: 03/02/2007	Request Date:03/02/2007	Resp#: 0/1
() LIBRE,NACHO	CCS#: 3860902	
Requestor: PHOMSOPHA,MOLLY	Priority: ROUTINE	
Subject: SS# MATCH WITH ANOTHER CLIENT		
Action Required By: 03/02/2007	Request Date:03/02/2007	Resp#: 0/1
[Quit]		
REQUEST FROM QUIT		

After pressing <Enter>, the Follow Up Response screen appears for user to take action.

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		CMSFU-40
[Quit]		37431741A 4 E F/R= E
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:		NDING
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER TWO		Action Taken Dt:
Notification to: Last Update By: FOLLOW UP,USER ONE		Accepted Dt: Date: 03/01/2007

To Respond to Follow Up Request: As Responder

User can also respond to follow up request by “*As Responder*”. The “As Responder” option is use to search for pending request sent to the user to take action as the requestor.

Step	Action
1	Type " R " for Respond to Follow Up Requests
2	Press <Enter>

FOLLOW UP
<p>Select Option:</p> <p>Edit Follow Up Requests and Responses</p> <p>Enter New Follow Up Request</p> <p>Follow Up History</p> <p>>Respond to Follow Up Requests</p> <p>[Quit]</p>

Step	Action
3	Type "AS" for As Responder
4	Press <Enter>

Respond to Follow Up Requests

SELECT OPTION

PATIENT
ACTION REQD BY DT

 REQUEST FROM
QUIT

After selecting “*As Responder*” the search result displays all requests that user needs to respond to.

Respond to Follow Up Requests		-50
<div style="display: flex; justify-content: space-between;"> () PIE,CHERRY CCS#: 3860903 </div> <div style="display: flex; justify-content: space-between;"> Requestor: FOLLOW UP,USER ONE Priority: ROUTINE </div> <div style="display: flex; justify-content: space-between;"> Subject: CALL CLIENT TO SCHEDULE APPT </div> <div style="display: flex; justify-content: space-between;"> Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 0/2 </div>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">[Quit]</div> <div style="text-align: center; padding: 20px;"> <p>PATIENT ACTION REQD BY DT *AS RESPONDER REQUEST FROM QUIT</p> </div>	

To Respond to Follow Up Request: Request From

User can also respond to follow up request by “Request From”. The “Request From” option is use to search for pending requests by user’s name that generated the request.

Step	Action
1	Type "R" for Respond to Follow Up Requests
2	Press <Enter>

FOLLOW UP
<p>Select Option:</p> <p>Edit Follow Up Requests and Responses</p> <p>Enter New Follow Up Request</p> <p>Follow Up History</p> <p>>Respond to Follow Up Requests</p> <p>[Quit]</p>

Step	Action
3	Type " R " for Request From
4	Press <Enter>

Respond to Follow Up Requests

SELECT OPTION

PATIENT
ACTION REQD BY DT
AS RESPONDER

>REQUEST FROM

QUIT

User Identification Screen After pressing <Enter>, the User Identification Screen appears:

Step	Action
1	In the name field, enter the user's last name and first name
2	Press <Enter>
3	Action menu displays.
4	Select " <i>Search</i> ".
5	Press <Enter>

CMSAT		USER IDENTIFICATION		Select One:	
				(?) Search	
				() Cancel	
				[Quit]	
Enter one or more of the following identifiers:					
Name:		FOLLOW UP,USER		User Status:	
County:					
Regional Office:					
Security Group:					
Unique Id:					

The system will pull all follow up request records sent to user by the selected user.

Step	Action
6	Select Record
7	Press <Enter>

Respond to Follow Up Requests		U-50
(?) LIBRE NACHO	CCS#: 3860902	
Requestor: FOLLOW UP, USER TWO	Priority: ROUTINE	
Subject: CONFIRM SPELLING OF NAME		
Action Required By: 03/02/2007 Request Date: 03/02/2007 Resp#: 0/1		
[Quit]		
REQUEST FROM QUIT		

Step	Action
8	After pressing <Enter>, the Follow Up Response Screen displays:

FOLLOW UP RESPONSE	
Pt Nm: LIBRE,NACHO Gender: M DOB: 01/01/2007 Lgl Co: ORANGE Request Date: 03/02/2007 Follow Up ID: 0307-000032 Requestor: FOLLOW UP,USER TWO Action Required By: 03/02/2007 Priority: ROUTINE	CCS#: 386090 REG= ACTIVE Stat [Quit]
Primary Addressee: MOMMA LIBRE Patient Contact Phone: (213) 987-4521 Other Phone: Provider: Telephone:	
Subject: CONFIRM SPELLING OF NAME Comments: IS THE CLIENT'S NAME CORRECT, IF NOT GET THE CORRECT SPELLING OF NAME.	
Follow Up By: FOLLOW UP,USER ONE NAME IS SPELLED CORRECT.	
Action Taken Dt: 03/02/2007	
Notification to: Last Update By: FOLLOW UP,USER TWO	
Accepted Dt: Date: 03/02/2007	

Action Menu The Follow Up Response Screen has four commands:

Select One : (?) Save () Print () Cancel
[Quit]

Command	Action
Save	Select <i>Save</i> from action menu to save data entered. Save will save the record and bring user to the <i>Follow Up Response Branch Menu</i> .
Print	Select <i>Print</i> will take user to the <i>Print Device</i> page to print and then to the <i>Follow Up Response Branch Menu</i> .
Cancel	Select <i>Cancel</i> will take user back to previous page. <i>Cancel</i> will not save the request but bring user back to the <i>Respond to Follow Up menu</i> .
Quit	Select <i>Quit</i> will take user back to screen. <i>Quit</i> will bring user back to the <i>Follow Up Response</i> screen to continue with data entry.

Branch Menu

The system shall send the user to the Follow Up Request Branch Menu under the following condition:

- Save is selected
- Print is selected

FOLLOW UP RESPONSE BRANCH MENU	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 LGL CO: SACRAMENTO REG= ACTIVE	MED= E F/R= E
<div style="margin-top: 20px;"> <input type="checkbox"/> Narrative for Follow Up Response <input type="checkbox"/> Mail Message for Follow Up Response <input type="checkbox"/> Select Option Menu <input type="checkbox"/> Follow Up Menu </div>	

If Not Finish with Request

As stated earlier, if you are not completely finish with your response and would still like to work on the case at a later time, leave the "Action Taken Dt" field blank.

To Restore Request Back in Respond to Follow Up Request (Pending Status)

If you would like to put request back to pending status (*Respond to Follow Up Request*), you must do so under the Edit Follow Up Requests and Responses.

Step	Action
1	Type " F " for Follow Up from the Primary Menu
2	Press <Enter>
3	Type " ED " for Edit Follow Up Requests and Responses from the Follow Up option
4	Press <Enter>
5	Type " AS " for As Responder or use the up arrow
6	Press <Enter>
7	Search Results display
8	Select Client's record
9	Press <Enter>
10	Follow Up Response Screen appears
11	Arrow down to the Action Taken Dt field
12	Use function <F7> to clear date in field
13	Also, if user wants to, he/she can arrow down to the comment section and edit comments or delete response comments.
14	Use function <F2> for Action Menu
15	Select <Save>
16	Press <Enter>

Once you delete date from *Action Taken Dt* field, the system will send the request back to the *Respond to Follow Up Request*.

Section 3: To Edit Follow Up Requests and Responses: As Requestor

Edit Follow Up Requests and Responses: As Requestor

The *Edit Follow Up Requests and Responses* will allow a user to edit his/her own follow up requests and responses. This section will focus on editing the request as the requestor, the person that generated the request.

As the Requestor

Under the *Edit Follow Up Requests and Responses* as the requestor, user can only edit requests. A request also has to be in *Responded To* status. Any other status; such as, *Complete*, *Delete*, or *No Action* will be found under *Follow Up History*.

Requestor Can Edit Following Fields:

As the requestor, user can view and edit his/her own requests. Requestor can edit the following fields:

- Action Required by
 - Priority
 - Provider
 - Subject
 - Comments
 - Request Follow Up To or Follow Up By
 - Notification to
-

**To Access Edit Follow Up
Requests and Responses**

Step	Action
1	Type "F" for Follow Up from the Primary Menu
2	Press <Enter>

PRIMARY OPTION
<p>Select Option:</p> <p>CHANGE ACCESS CODE DISPLAY ELIGIBILITY LOG ELECTRONIC POST-IT NOTE ELIGIBILITY EVENT TRACKING ... >FOLLOW UP ... GENERATE REQUESTS/AUTHORIZATIONS ... MailMan Menu ... MEDICAL THERAPY PROGRAM ... REGISTRATION ... SYSTEM MAINTENANCE ...</p> <hr/> <p>[Quit]</p>

**To Edit Follow Up Requests
and Responses: As Requestor**

Step	Action
3	Type "ED" for Edit Follow Up Requests and Responses from the Follow Up option
4	Press <Enter>

FOLLOW UP
<p>Select Option:</p> <div><div>>Edit Follow Up Requests and Responses</div><div>Enter New Follow Up Request</div><div>Follow Up History</div><div>Respond to Follow Up Requests</div></div> <hr/> <div>[Quit]</div>

Edit Follow Up Requests and Responses Select Option

After pressing <Enter>, the Edit Follow Up Requests and Responses Select Option appears:

Step	Action
1	Type "A" for As Requestor or use the up arrow
2	Press <Enter>

Edit Follow Up Requests and Responses

SELECT OPTION:

```
>AS REQUESTOR
AS RESPONDER
BY PATIENT      >
BY ACTION REQD BY DT>
QUIT
```

Once user select <As Requestor> and press <Enter>, the system will display all results for follow up requests that user generated as the requestor.

-20

Edit Follow Up Requests and Responses

() PIE,CHERRYCCS#: 3860903

Requestor: PHOMSOPHA,MOLLY

Priority: ROUTINE

Subject: CALL CLIENT TO SCHEDULE APPT

Action Required By: 03/01/2007 Request Date:03/02/2007 Resp#: 0/1

() LIBRE,NACHOCCS#: 3860902

Requestor: PHOMSOPHA,MOLLY

Priority: ROUTINE

Subject: SCHEDULE APPT

Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1

() LIBRE,NACHOCCS#: 3860902

Requestor: PHOMSOPHA,MOLLY

Priority: ROUTINE

Subject: SS# MATCH WITH ANOTHER CLIENT

Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1

[PREVIOUS] [Quit]

Requestor

Client's Name

**Follow Up
Request
Screen**

Select the client's record and if no user has taken action on request that he/she sent out; the system will display the Follow Up Request screen.

CMSAT		FOLLOW UP REQUEST		Select One:
Pt Nm: PIE,CHERRY		CCS#: 386090		<input type="checkbox"/> Save
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE				<input type="checkbox"/> Delete
				<input type="checkbox"/> Print
				<input type="checkbox"/> Cancel
Request Date: 03/01/2007 Follow Up ID: 0307-000018		Stat		[Quit]
Requestor: FOLLOW UP,USER ONE				
Action Required By: 03/01/2007		Priority: ROUTINE		
Primary Addressee: BERRY AND COCO PIE		Follow Up Request Screen		
Patient Contact Phone: (916) 999-9999	Other Phone:			
Provider:	Telephone:			
Subject: CALL CLIENT TO SCHEDULE APPT				
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECUASE BERRY PIE DOES NOT SPEAK ENGLISH.				
Request Follow Up to: FOLLOW UP,USER FOUR FOLLOW UP,USER TWO				
Notification to: FOLLOW UP,USER THREE				
Last Update By: FOLLOW UP,USER ONE		Date: 03/01/2007		

Or the system will display:

Follow Up Response Screen From search result select client and the system will display the *Follow Up Response* screen if the request has been responded by at least one user.

FOLLOW UP RESPONSE	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE	MED= E F/R= E
Request Date: 03/01/2007 Follow Up ID: 0307-000019	Status: RESPONDED TO
Requestor: FOLLOW UP,USER ONE	
Action Required By: 03/01/2007 Priority: ROUTINE	
Primary Addressee: BERRY AND COCO PIE	Follow Up Response Screen
Patient Contact Phone: (916) 999-9999 Other Phone:	
Provider: Telephone:	
Subject: CALL CLIENT TO SCHEDULE APPT	
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Follow Up By: FOLLOW UP,USER THREE	Action Taken Dt: 03/01/2007
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.	
Notification to: FOLLOW UP,USER FIVE	Accepted Dt:
Last Update By: FOLLOW UP,USER TWO	Date: 03/01/2007

If user responded to the request, a pop-up comment box will appear inside the *Follow Up Response Screen* when user arrow down to the *Follow Up By* field. The comment box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> or <Quit> will take user to the next comment box or to the next Follow Up By user's name.

Response#: 2 Follow Up By: FOLLOW UP,USER TWO Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. [Quit]		CMSFU-40 1741A 4 F/R= E E
Primary Addressee: E Patient Contact Phone: 0 Provider:	<div style="border: 2px solid black; padding: 10px; text-align: center;"> Follow Up Response Comments Box </div>	
Subject: CALL CLIENT TO Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH. Follow Up By: FOLLOW UP,USER TWO CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER.		
Notification to: Last Update By: FOLLOW UP,USER ONE		Action Taken Dt: 03/01/2007 Accepted Dt: Date: 03/01/2007

Follow Up Response Screen with Response Comments Box

If there are no more responses left to view, the system will take user to the Follow Up By field. The field will be blank to allow editing.

Requestor can edit following fields: Action Required by, Priority, Provider, Subject, Comments, Follow Up By, and Notification to.

Requestor can delete individuals or add individuals at any point if that individual has not taken action on request.

To Add New User to Follow Up by Field or Notification to Field

Step	Action
1	Use <F1> to bring up User Pick List or type Last Name, First Name of User
2	Press <Enter>

Select One: FOLLOW UP,USER FIVE FOLLOW UP,USER FOUR FOLLOW UP,USER ONE >FOLLOW UP,USER THREE FOLLOW UP,USER TWO [Quit]	FOLLOW UP RESPONSE CCS#: 386090 Lgl Co: SACRAMENTO REG= ACTIVE Follow Up ID: 0307-000019 Stat ONE 2007 Priority: ROUTINE	Select One: 0 () Save () Print () Cancel [Quit]
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:		
Subject: CALL CLIENT TO SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: follow Action Taken Dt:		
Notification to: Last Update By: FOLLOW UP,USER TWO Accepted Dt: Date: 03/02/2007		

To Delete User to Follow Up by Field or Notification to Field

Step	Action
1	Use <F7> to clear the field
2	Press <Enter>

At this point, if user does not want to notify another user about existing request, press <Enter> to by pass the field.

From the *Notification to* field when finish tab to the end or <F2> to bring up action menu. This will allow user to *Save, Delete, Print, or Cancel*.

**To Edit Follow Up Requests
and Responses: By Patient
> As Requestor**

Step	Action
1	Select By Patient
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select As Requestor
5	Press <Enter>

Edit Follow Up Requests and Responses

SELECT OPTION :

AS REQUESTOR
AS RESPONDER

*BY PATIENT	>	*AS REQUESTOR
-------------	---	---------------

BY ACTION REQD BY DT AS RESPONDER
QUIT

Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

PATIENT IDENTIFICATION FOR: Edit Follow Up Requests and Responses	
Enter one of the following identifiers:	
CCS Number :	
Pt Name :	Birthdate :
Current Legal County :	Gender :
Client Index Number :	
Social Security Number :	

For instructions on identifying patient, see the Patient ID section of this manual.

Search Results

From search result, select client's record.

Select Patient:		-20
() <u>PIE, CHERRY</u>	Gender: F DOB: 03/01/2002	
CCS#: 8860903 CIN: 37431741A 4	Legal County: SACRAMENTO	
Reg=ACT Med=E F/R=E Pgrm End Dt:	CCS Elig Stat: 9K CCS	
[Quit]		
CCS Number :		
Pt Name: <u>PIE, CHERRY</u>	Birthdate :	
Current Legal County:	Gender :	
Client Index Number :		
Social Security Number :		

After client selection, the Follow Up Request Screen or Follow Up Response Screen will appear:

**Follow Up
Request
Screen**

Select the record and the system will display the Follow Up Request screen if no user has taken action on request that he/she sent out.

CMSAT		FOLLOW UP REQUEST		Select One:
Pt Nm: PIE,CHERRY		CCS#: 386090		<input type="checkbox"/> Save
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE				<input type="checkbox"/> Delete
				<input type="checkbox"/> Print
				<input type="checkbox"/> Cancel
Request Date: 03/01/2007 Follow Up ID: 0307-000018		Stat		[Quit]
Requestor: FOLLOW UP,USER ONE				
Action Required By: 03/01/2007		Priority: ROUTINE		
Primary Addressee: BERRY AND COCO PIE		Follow Up Request Screen		
Patient Contact Phone: (916) 999-9999	Other Phone:			
Provider:	Telephone:			
Subject: CALL CLIENT TO SCHEDULE APPT				
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECUASE BERRY PIE DOES NOT SPEAK ENGLISH.				
Request Follow Up to: FOLLOW UP,USER FOUR FOLLOW UP,USER TWO				
Notification to: FOLLOW UP,USER THREE				
Last Update By: FOLLOW UP,USER ONE		Date: 03/01/2007		

Or the system will display:

**Follow Up
Response
Screen**

From search result select client and the system will display the *Follow Up Response* screen if the request has been responded by at least one user.

FOLLOW UP RESPONSE	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE	MED= E F/R= E
Request Date: 03/01/2007 Follow Up ID: 0307-000019	Status: RESPONDED TO
Requestor: FOLLOW UP,USER ONE	
Action Required By: 03/01/2007 Priority: ROUTINE	
Primary Addressee: BERRY AND COCO PIE	Follow Up Response Screen
Patient Contact Phone: (916) 999-9999 Other Phone:	
Provider:	Telephone:
Subject: CALL CLIENT TO SCHEDULE APPT	
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Follow Up By: FOLLOW UP,USER THREE	Action Taken Dt: 03/01/2007
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.	
Notification to: FOLLOW UP,USER FIVE	Accepted Dt:
Last Update By: FOLLOW UP,USER TWO	Date: 03/01/2007

When done <F2> will display action menu. Select <Save> from the action menu to save changes to request and system will bring user to the *Follow Up Request Branch Menu*.

**To Edit Follow Up Requests and
Responses: By Action Req'd By
Dt > As Requestor**

Step	Action
1	Select < By Action Req'd by Dt > from Select Option
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select < As Requestor >
5	Press <Enter>

Edit Follow Up Requests and Responses

SELECT OPTION :

AS REQUESTOR
AS RESPONDER
BY PATIENT >

*BY ACTION REQ'D BY DT >AS REQUESTOR
QUIT AS RESPONDER

Follow Up-Dates Screen

After pressing <Enter>, the Follow Up- Dates Screen will appear:

Step	Action
1	Enter the date range in the following fields: " From " and " To ".
2	Press <Enter>
3	Select < Search > from Action Menu
4	Press <Enter>

FOLLOW UP - DATES

View follow up records within the following date range:

Date Range - From: 03/01/2007 To: 03/01/2007

Date Range

Select One:
() Search
() Cancel

[Quit]

Step	Action
5	Select Record
6	Press <Enter>

Edit Follow Up Requests and Responses	
(?) PIE,CHERRY	CCS#: 3860903
Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
Subject: REQUESTING EXTRA INFORMATION	
Action Required By: 03/01/2007 Request Date:03/02/2007 Resp#: 0/1	
[Quit]	

**Follow Up
Request
Screen**

After search result, select client and the system will display the Follow Up Request screen if no user has responded to the request.

CMSAT		FOLLOW UP REQUEST		Select One:
Pt Nm: PIE,CHERRY	CCS#: 386090			<input type="checkbox"/> Save
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE				<input type="checkbox"/> Delete
				<input type="checkbox"/> Print
				<input type="checkbox"/> Cancel
Request Date: 03/01/2007 Follow Up ID: 0307-000018	Stat			[Quit]
Requestor: FOLLOW UP,USER ONE				
Action Required By: 03/01/2007	Priority: ROUTINE			
Primary Addressee: BERRY AND COCO PIE				
Patient Contact Phone: (916) 999-9999	Other Phone:			
Provider:	Telephone:			
Subject: CALL CLIENT TO SCHEDULE APPT				
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECUASE BERRY PIE DOES NOT SPEAK ENGLISH.				
Request Follow Up to: FOLLOW UP,USER FOUR FOLLOW UP,USER TWO				
Notification to: FOLLOW UP,USER THREE				
Last Update By: FOLLOW UP,USER ONE		Date: 03/01/2007		

Follow Up Request Screen

Or the system will display:

**Follow Up
Request
Screen**

From search result select client and the system will display the *Follow Up Response* screen if the request has been responded by at least one user.

FOLLOW UP RESPONSE	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE	MED= E F/R= E
Request Date: 03/01/2007 Follow Up ID: 0307-000019	Status: RESPONDED TO
Requestor: FOLLOW UP,USER ONE	
Action Required By: 03/01/2007 Priority: ROUTINE	
Primary Addressee: BERRY AND COCO PIE	Follow Up Response Screen
Patient Contact Phone: (916) 999-9999 Other Phone:	
Provider:	Telephone:
Subject: CALL CLIENT TO SCHEDULE APPT	
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Follow Up By: FOLLOW UP,USER THREE	Action Taken Dt: 03/01/2007
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.	
Notification to: FOLLOW UP,USER FIVE	Accepted Dt:
Last Update By: FOLLOW UP,USER TWO	Date: 03/01/2007

After editing, <F2> will bring up Action Menu.

Select One:
<input type="checkbox"/> Save
<input type="checkbox"/> Delete
<input type="checkbox"/> Print
<input type="checkbox"/> Cancel
[Quit]

Command	Action
Save	Select <Save> from action menu to save data entered.
Print	Select <Print> will take user to the <i>Print Device</i> page to print and then to the <i>Follow Up Request Branch Menu</i> .
Delete	Select <Delete> will delete the request.
Cancel	Select <Cancel> will take user back to previous page. <i>Cancel</i> will not save the request but bring user back to the <i>Edit Follow Up Requests and Responses Menu</i>
Quit	Select <Quit> will take user back to screen.

**Follow Up
Request
Branch Menu**

The system shall send the user to the Follow Up Request Branch Menu under the following condition:

- Save is selected
- Print is selected
- Delete is selected
- Complete is selected

FOLLOW UP REQUEST BRANCH MENU	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 LGL CO: SACRAMENTO REG= ACTIVE	MED= E F/R= E
<div style="text-align: center;">(?) Narrative for Follow Up Requests () Mail Message for Follow Up Requests () Edit Follow Up Requests and Responses () Follow Up Menu</div>	

Branch Menu

From Branch Menu:

- Select <Narrative for Follow Up Request> will allow user to generate a narrative for request.
- Select <Mail Message for Follow Up Request> will allow user to mail message.
- Select <Edit Follow Up Requests and Responses> will take user the Edit Follow Up Requests and Responses menu.
- Select <Follow Up Menu> will take user to the Follow Up menu.

Completing a Follow Up Request

When a request has been responded by all users, you can complete the requests under the following conditions:

- Status of request is Responded To
- All users have responded to follow up request
- The user is the person that created the request

NOTE: If a request has not been responded by all users, the *Complete* option will not appear in the action menu for user to select.

Select One: <input type="checkbox"/> Save <input type="checkbox"/> Delete <input type="checkbox"/> Print <input type="checkbox"/> Complete <input type="checkbox"/> Cancel
[Quit]

Action Menu with Compete Option

CMSAT		FOLLOW UP RESPONSE		0		
Pt Nm: PIE,CHERRY		CCS#: 386090		<table border="1"> <tr> <td> Select One: <input type="checkbox"/> Save <input type="checkbox"/> Delete <input type="checkbox"/> Print <input checked="" type="checkbox"/> Complete <input type="checkbox"/> Cancel </td> </tr> <tr> <td>[Quit]</td> </tr> </table>	Select One: <input type="checkbox"/> Save <input type="checkbox"/> Delete <input type="checkbox"/> Print <input checked="" type="checkbox"/> Complete <input type="checkbox"/> Cancel	[Quit]
Select One: <input type="checkbox"/> Save <input type="checkbox"/> Delete <input type="checkbox"/> Print <input checked="" type="checkbox"/> Complete <input type="checkbox"/> Cancel						
[Quit]						
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE						
Request Date: 03/02/2007 Follow Up ID: 0307-000024 Stat						
Requestor: PHOMSOPHA,MOLLY						
Action Required By: 03/02/2007 Priority: ROUTINE						
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Select complete to complete request Provider: Telephone:						
Subject: SENT OUT PSA TO CLIENT Comments: CALL CLIENT TO VERIFY IF ADDRESS IS CORRECT AND IF CLIENT RESIDES IN SACRAMENTO COUNTY.						
Follow Up By: FOLLOW UP,USER TWO		Action Taken Dt: 03/02/2007				
VERIFIED CLIENT'S ADDRESS. ADDRESS IS CORRECT.						
Notification to:		Accepted Dt:				
Last Update By: FOLLOW UP,USER TWO		Date: 03/02/2007				

To Complete a Follow Up Request

Step	Action
1	Use function <F2> for Action Menu
2	Select <Complete> from Action Menu
3	Press <Enter>

After user completes the follow up request, it will be sent to the *Follow Up History* after the status change.

**Auto
Generated
Narrative**

After user completes a request, the system will auto generate a narrative stating, "The requestor has completed the request".

02/16/2007	ENTERED BY: LAST NAME, FIRST NAME
SUBJ: FOLLOW UP RESPONSE	
Follow Up ID: 0207-000003 Request Date: 02/15/2007 Action	
Required by Date: 02/15/2007 The requestor has completed the	
request	Follow Up Comments: UPDATE PSA INFORMATION

Deleting a Follow Up Request

User can delete a request at any time if user was the person that generated the follow up request. If user decides to delete a request a pop-up message “*Are you sure you want to change the status to delete?*” will first appear.

Are you sure you want to change the status to delete?

(?) YES

() NO

To Delete a Follow Up Request

Action	Action
1	Select Delete
2	Press <Enter>
3	Select Yes from Auto Message Box
4	Press <Enter>

Deleting a Request Will Send the Request to Follow Up History

After user deletes the request, system will be sent request to the *Follow Up History*. Request will not be deleted from the system but will remain in *Follow Up History* for viewing, therefore, deleting a request means sending the requests to the *Follow Up History*.

Auto Generated Narrative

After user completes a request, the system will auto generate a narrative stating, “The requestor has deleted the request”.

```
02/16/2007          ENTERED BY:  LAST NAME, FIRST NAME
SUBJ: Follow Up Request
Follow Up ID: 0207-000003 Request Date: 02/15/2007 Action
Required by Date: 02/15/2007 [The requestor has deleted the
[request] Subject: PSA UPDATE Follow Up Comments: UPDATE PSA
INFORMATION
```

Section 4: Edit Follow Up Requests and Responses: As Responder

Edit Follow Up Requests and Responses: As Responder

The *Edit Follow Up Requests and Responses* will allow user to edit follow up requests and responses. User can edit request as the As Responder, As Requestor, By Patient, and By Action Req'd by Dt. This section will focus on editing follow up request as the responder.

As the Responder

As the responder, the user will not be able to view other users' comments but will be able to view or edit his/her own comments.

Under the *Edit Follow Up Requests and Responses* as the responder, user can only edit requests. A request also has to be in *Responded To* status. Any other status; such as, *Complete*, *Delete*, or *No Action* will be found under *Follow Up History*.

Responder's editable fields:

As the responder, the user can only edit the following fields:

If user is the Follow Up By user:

- Follow Up By
- Action Taken Dt

If user is the Notification To user:

- Notification To
 - Accepted Dt
-

**To Edit Follow Up Requests and
Responses: As Responder**

Step	Action
1	Type "F" for Follow Up from the Primary Menu
2	Press <Enter>

PRIMARY OPTION
<p>Select Option:</p> <p>CHANGE ACCESS CODE DISPLAY ELIGIBILITY LOG ELECTRONIC POST-IT NOTE ELIGIBILITY EVENT TRACKING ... >FOLLOW UP ... GENERATE REQUESTS/AUTHORIZATIONS ... MailMan Menu ... MEDICAL THERAPY PROGRAM ... REGISTRATION ... SYSTEM MAINTENANCE ...</p> <hr/> <p>[Quit]</p>

Step	Action
3	Type "ED" for Edit Follow Up Requests and Responses from the Follow Up option
4	Press <Enter>

FOLLOW UP
<p>Select Option:</p> <div><div>>Edit Follow Up Requests and Responses</div><div>Enter New Follow Up Request</div><div>Follow Up History</div><div>Respond to Follow Up Requests</div></div> <hr/> <div>[Quit]</div>

Edit Follow Up Requests and Responses Select Option

After pressing <Enter>, the Edit Follow Up Requests and Responses Select Option appears:

Step	Action
1	Type " AS " for As Responder or use the up arrow
2	Press <Enter>

Edit Follow Up Requests and Responses

SELECT OPTION:

AS REQUESTOR

>AS RESPONDER

BY PATIENT >

BY ACTION REQD BY DT>

QUIT

Step	Action
3	Search Results display
4	Select Client's record
5	Press <Enter>

Edit Follow Up Requests and Responses

() PIE,CHERRY CCS#: 3860903
Requestor: PHOMSOPHA,MOLLY Priority: ROUTINE
Subject: CALL CLIENT TO SCHEDULE APPT
Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 1/1

[Quit]

AS REQUESTOR
*AS RESPONDER
BY PATIENT >
BY ACTION REQD BY DT>
QUIT

Follow Up Response screen display after client selection and at the same time the *Follow Up Comments* box will auto display on screen for viewing. Press <Enter> to get rid of comment box.

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		37431741A 4 E F/R= E
[Quit]		SPONDED TO
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:		<div style="border: 2px solid black; padding: 5px; text-align: center;"> Follow Up Comments box </div>
Subject: CALL CLIENT TO SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER THREE CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		Action Taken Dt: 03/01/2007
Notification to: Last Update By: FOLLOW UP,USER THREE		Accepted Dt: Date: 03/01/2007

Follow Up Response Screen with Follow Up Comments Box

User can edit response field under the *Follow Up By* and *Action Taken Dt* or if request was sent to user as the *Notification to* person, he/she can edit the *Accepted Dt* field. When done, <F2> will bring up the action menu. Select <Save> from the action menu to save changes to request and system will bring user to the *Follow Up Response Branch Menu*.

To Edit Follow Up Requests and Responses: By Patient If user knows the client's name, user can edit follow up requests that he/she took action by doing a client search.
> As Responder

Step	Action
1	Select By Patient
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select As Responder
5	Press <Enter>

CMSST Edit Follow Up Requests and Responses CMSFU-20

SELECT OPTION:

AS REQUESTOR
AS RESPONDER
*BY PATIENT AS REQUESTOR
BY ACTION REQD BY DT >AS RESPONDER
QUIT

Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

CMSAT	PATIENT IDENTIFICATION FOR: Follow Up History	CMSPI-20
<p>Enter one of the following identifiers:</p> <p>CCS Number :</p> <p>Pt Name: <input type="text" value="PIE,CHERRY"/> Birthdate :</p> <p>Current Legal County: Gender :</p> <p>Client Index Number :</p> <p>Social Security Number :</p>		

For instructions on identifying patient, see the Patient ID section of this manual.

System will search for all requests by client's name.

Follow Up History

() PIE,CHERRY

CCS#: 3860903

Requestor: FOLLOW UP,USER ONE

Priority: ROUTINE

Subject: CALL CLIENT TO SCHEDULE APPT

Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2

() PIE,CHERRY

CCS#: 3860903

Requestor: FOLLOW UP,USER ONE

Priority: ROUTINE

Subject: SCHEDULE APPT

Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2

[Quit]

QUIT

**Follow Up
Response
Screen**

Select request record and press <Enter>. After pressing <Enter>, the Follow Up Response Screen appears:

FOLLOW UP RESPONSE	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE	MED= E F/R= E
Request Date: 03/01/2007 Follow Up ID: 0307-000019	Status: RESPONDED TO
Requestor: FOLLOW UP,USER ONE	
Action Required By: 03/01/2007 Priority: ROUTINE	
Primary Addressee: BERRY AND COCO PIE	Follow Up Response Screen
Patient Contact Phone: (916) 999-9999 Other Phone:	
Provider:	Telephone:
Subject: CALL CLIENT TO SCHEDULE APPT	
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Follow Up By: FOLLOW UP,USER THREE	Action Taken Dt: 03/01/2007
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.	
Notification to: FOLLOW UP,USER FIVE	Accepted Dt:
Last Update By: FOLLOW UP,USER TWO	Date: 03/01/2007

To Edit Follow Up

Requests and Responses: User can also edit follow up request by Action Required By date.
By Action Req'd By Dt >
As Responder

Step	Action
1	Select By Action Req'd by Dt
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select As Responder
5	Press <Enter>

Edit Follow Up Requests and Responses

SELECT OPTION:

AS REQUESTOR
AS RESPONDER
BY PATIENT

*BY ACTION REQ'D BY DT AS REQUESTOR
QUIT >AS RESPONDER

After selecting the *By Action Req'd by Dt* as *As Responder*, the *Follow Up-Dates* menu will display for user to enter in date range.

**Follow Up-
Dates Screen**

After pressing <Enter>, the Follow Up- Dates Screen will appear:

Step	Action
1	Enter the date range "From" and "To".
2	Press <Enter>
3	Select "Search" from the Action Menu

FOLLOW UP - DATES

View follow up records within the following date range:

Date Range - From: 03/02/2007 To: 03/02/2007

Date Range

Select One:

☐ Search

☐ Cancel

[Quit]

System will search for all requests base on the date entered.

Step	Action
4	Press <Enter>
5	Select Client's record
6	Press <Enter>

Edit Follow Up Requests and Responses	
()	PIE,CHERRY CCS#: 3860903 Requestor: PHOMSOPHA,MOLLY Priority: ROUTINE Subject: CALL CLIENT TO SCHEDULE APPT Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 1/1
()	LIBRE,NACHO CCS#: 3860903 Requestor: PHOMSOPHA,MOLLY Priority: ROUTINE Subject: SCHEDULE APPT Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1
()	LIBRE,NACHO CCS#: 3860902 Requestor: PHOMSOPHA,MOLLY Priority: ROUTINE Subject: SS# MATCH WITH ANOTHER CLIENT Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1
[Quit]	

After pressing <Enter>, the Follow Up Response screen appears:

CMSAT FOLLOW UP RESPONSE		Select One: 0
Pt Nm: PIE,CHERRY	CCS#: 386090	<input type="radio"/> Save
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE		<input type="radio"/> Print
		<input type="radio"/> Cancel
Request Date: 03/01/2007	Follow Up ID: 0307-000019	Stat [Quit]
Requestor: FOLLOW UP,USER ONE		
Action Required By: 03/02/2007 Priority: ROUTINE		
Primary Addressee: BERRY AND COCO PIE		
Patient Contact Phone: (916) 999-9999 Other Phone:		
Provider: Telephone:		
Subject: CALL CLIENT TO SCHEDULE APPT		
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER THREE		Action Taken Dt: 03/01/2007
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		
Notification to:		Accepted Dt:
Last Update By: FOLLOW UP,USER THREE		Date: 03/01/2007

**Follow Up Response
Branch Menu**

When done, <F2> will bring up the action menu. Select “Save” and system will take user to the Follow Up Response Branch Menu.

FOLLOW UP RESPONSE BRANCH MENU	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 LGL CO: SACRAMENTO	REG= ACTIVE MED= E F/R= E
<div style="text-align: center;"><p>(?) Narrative for Follow Up Response</p><p>() Mail Message for Follow Up Response</p><p>() Edit Follow Up Requests and Responses</p><p>() Follow Up Menu</p></div>	

**If Not Finish
with Request**

As stated earlier, if you are not completely finish with your request and would like to restore the request back to its previous status, which is “pending” under the *Respond to Follow Up Request*, remove the date from the “Action Taken Dt” field.

**To Restore Request to Respond
to Follow Up Requests**

Step	Action
1	Type " F " for Follow Up from the Primary Menu
2	Press <Enter>
3	Type " ED " for Edit Follow Up Requests and Responses from the Follow Up option
4	Press <Enter>
5	Type " AS " for As Responder or use the up arrow
6	Press <Enter>
7	Search Results display
8	Select Client's record
9	Press <Enter>
10	Follow Up Response Screen appears
11	Arrow down to the Action Taken Dt field
12	Use function <F7> to clear date in field
13	Also, if user wants to, he/she can arrow down to the comment section and edit comments or delete response comments.
14	Use function <F2> for Action Menu
15	Select <Save>
16	Press <Enter>

Once you delete date from *Action Taken Dt* field, the system will send the request back to the *Respond to Follow Up Request*.

Section 5: Follow Up History

Follow Up History User can view history of follow up requests in the Follow Up History. User will have the options to search for requests that are in *Complete*, *Deleted* or in *No Action* status by the following options: *As Requestor*, *As Responder*, *By Patient*, or *By Action Req'd by Dt.*

View Only Both Requestor and Responder can only view requests in the *Follow Up History* that are in *Complete*, *Deleted* or in *No Action* Status.

To Access Follow Up History

Step	Action
1	Type "F" for Follow Up from Primary Option
2	Press <Enter>

Core Applications
<p>Select Option:</p> <p>CHANGE ACCESS CODE DISPLAY ELIGIBILITY LOG DOWNLOAD DATA ... ELECTRONIC POST-IT NOTE ELIGIBILITY EVENT TRACKING ... >FOLLOW UP ... GENERATE REQUESTS/AUTHS/CLAIMS ... MailMan Menu ... REGISTRATION ... SYSTEMS MAINTENANCE ... THERAPY UNIT ...</p> <hr/> <p>[Quit]</p>

Step	Action
3	Type " F " for Follow Up History from Follow Up Menu
4	Press <Enter>

FOLLOW UP	CMSMP-10
-----------	----------

Select Option:

Edit Follow Up Requests and Responses

Enter New Follow Up Request

>Follow Up History

Respond to Follow Up Requests

[Quit]

**Follow Up
History Select
Option**

After pressing <Enter>, the Follow Up History Select Option appears:

<p>Follow Up History</p> <p>SELECT OPTION:</p> <p>AS REQUESTOR AS RESPONDER BY PATIENT > *BY ACTION REQD BY DT >AS REQUESTOR QUIT AS RESPONDER</p>
--

**To Access Follow Up
History: As Requestor**

User can view follow up request history by selecting <As Requestor>. The system will search and list all follow up requests that user generated.

Step	Action
1	Type "AS" for As Requestor or use the up arrow
2	Press <Enter>

CMSAT	Follow Up History	CMSFU-20
SELECT OPTION:		
<div style="border: 1px solid black; padding: 2px; display: inline-block;">>AS REQUESTOR</div> AS RESPONDER BY PATIENT > BY ACTION REQD BY DT> QUIT		

Step	Action
3	Search Results display
4	Select Client's record
5	Press <Enter>

Follow Up History		-20
() PIE,CHERRY	CCS#: 3860903	
Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE	
Subject: CALL CLIENT TO SCHEDULE APPT		
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2		
() PIE,CHERRY	CCS#: 3860903	
Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE	
Subject: SCHEDULE APPT		
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2		
[Quit]		
QUIT		

After pressing <Enter>, the Follow Up History Screen appears:

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		CMSFU-40
[Quit]		37431741A 4 E F/R= E MPLETE
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Requestor's Comment </div>		
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Oth Provider:		
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER THREE Action Taken Dt: 03/01/2007 CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		
Notification to: Accepted Dt: Last Update By: FOLLOW UP,USER ONE Date: 03/01/2007		

Follow Up *Follow Up History* screen display after client selection and at the same time the
Comments Box *Follow Up Comments* box auto displays on screen for viewing. Press <Enter> to
 get rid of comment box.

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.
[Quit]

Follow Up Response Comments Box After the follow up comments box displays, an auto follow up response comments box will appear. The response comments box will have the following information: Response #, Follow Up By, and Comments.

Response#: 2 Follow Up By: FOLLOW UP,USER TWO Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. [Quit]		CMSFU-40 1741A 4 F/R= E E
Primary Addressee: E Patient Contact Phone: 0 Provider:	<div style="border: 2px solid black; padding: 10px; text-align: center;"> Follow Up Response Comments Box </div>	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH. Follow Up By: FOLLOW UP,USER TWO Action Taken Dt: 03/01/2007 CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. Notification to: Accepted Dt: Last Update By: FOLLOW UP,USER ONE Date: 03/01/2007		

Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.

FOLLOW UP HISTORY	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE	MED= E F/R= E
Request Date: 03/01/2007 Follow Up ID: 0307-000019 Status: COMPLETE	
Requestor: FOLLOW UP,USER ONE	
Action Required By: 03/01/2007 Priority: ROUTINE	
Primary Addressee: BERRY AND COCO PIE	
Patient Contact Phone: (916) 999-9999	Other Phone:
Provider:	Telephone:
Subject: SCHEDULE APPT	
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Follow Up By: FOLLOW UP,USER THREE	Action Taken Dt: 03/01/2007
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.	
Notification to:	Accepted Dt:
Last Update By: FOLLOW UP,USER ONE	Date: 03/01/2007

Follow Up History Screen

**To Access Follow Up
History: As Responder**

User can view follow up request history by selecting <As Responder>. The system will search and list all results for follow up requests that user took action.

Step	Action
1	Type "AS" for As Responder or use the up arrow
2	Press <Enter>

Follow Up History

SELECT OPTION:

AS REQUESTOR

*AS RESPONDER

BY PATIENT >

BY ACTION REQD BY DT>

QUIT

Step	Action
3	Search Results display
4	Select Client's record
5	Press <Enter>

Follow Up History		-20
()	PIE,CHERRY	CCS#: 3860903
	Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
	Subject: CALL CLIENT TO SCHEDULE APPT	
	Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
()	PIE,CHERRY	CCS#: 3860903
	Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
	Subject: SCHEDULE APPT	
	Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
[Quit]		
QUIT		

Follow Up Response Comments Box After the follow up comments box display, an auto follow up response comments box will appear. The response comments box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.

Response#: 2		CMSFU-40
Follow Up By: FOLLOW UP,USER TWO		1741A 4
Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER.		F/R= E
[Quit]		E
<div style="border: 2px solid black; padding: 10px; text-align: center;"> Follow Up Response Comments Box </div>		
Primary Addressee: B Patient Contact Phone: Provider:		
Subject: SCHEDULE APPT		
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER TWO		Action Taken Dt: 03/01/2007
CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER.		
Notification to:		Accepted Dt:
Last Update By: FOLLOW UP,USER ONE		Date: 03/01/2007

When finish viewing request, tab to the end or <F2> to bring up action menu.
This will allow user to *Print, Cancel, or Quit*.

To Access Follow Up History: By Patient > As Requestor

User can also view request history by client search. To view request history of a request that user generated, select <As Requestor>.

Step	Action
1	Select By Patient from Follow Up History select option
2	Press <Enter>
3	A pop-up will display two more options: As Requestor/ As Responder
4	Select As Requestor
5	Press <Enter>

Follow Up History

SELECT OPTION:

AS REQUESTOR
AS RESPONDER
***BY PATIENT > >AS REQUESTOR**
BY ACTION REQD BY DT AS RESPONDER
QUIT

Or the system displays:

To Access Follow Up History: By Patient > As Responder

User can also view request history by client search. To view request history of a request that user took action, select <As Responder>.

Step	Action
1	Select By Patient from Follow Up History select option
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select As Responder
5	Press <Enter>

Follow Up History

SELECT OPTION:

AS REQUESTOR
AS RESPONDER

*BY PATIENT > AS REQUESTOR
BY ACTION REQD BY DT >AS RESPONDER
QUIT

Identify Patient After selecting either *As Requestor* or *As Responder*, the Patient Identification Screen, CMSPI-10 appears:

CMSAT	PATIENT IDENTIFICATION FOR: Follow Up History	CMSPI-20
<p>Enter one of the following identifiers:</p> <p>CCS Number :</p> <p>Pt Name: <input type="text" value="PIE,CHERRY"/> Birthdate :</p> <p>Current Legal County: Gender :</p> <p>Client Index Number :</p> <p>Social Security Number :</p>		

For instructions on identifying patient, see the Patient ID section of this manual.

Select the client's record from the search results:

Follow Up History		-20
<input type="checkbox"/>	PIE,CHERRY Requestor: FOLLOW UP,USER ONE Subject: CALL CLIENT TO SCHEDULE APPT Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2 CCS#: 3860903 Priority: ROUTINE	
<input type="checkbox"/>	PIE,CHERRY Requestor: FOLLOW UP,USER ONE Subject: SCHEDULE APPT Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2 CCS#: 3860903 Priority: ROUTINE	
[Quit]		
QUIT		

After client selection press <Enter>, the Follow Up History Screen appears:

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		CMSFU-40
[Quit]		37431741A 4 E F/R= E MPLETE
<div style="border: 1px solid black; padding: 5px; display: inline-block;">Requestor's Comment</div>		
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other: Provider:		
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER THREE Action Taken Dt: 03/01/2007 CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		
Notification to: Accepted Dt: Last Update By: FOLLOW UP,USER ONE Date: 03/01/2007		

Follow Up Comments Box *Follow Up History* screen display after client selection and at the same time the *Follow Up Comments* box auto displays on screen for viewing. Press <Enter> to get rid of comment box.

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.
[Quit]

Follow Up Response Comments Box After the follow up comments box displays, an auto follow up response comments box will appear. The response comments box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.

Response#: 2 Follow Up By: FOLLOW UP,USER TWO Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. [Quit]		CMSFU-40 1741A 4 F/R= E E
Primary Addressee: E Patient Contact Phone: 0 Provider:	<div style="border: 2px solid black; padding: 10px; text-align: center;"> Follow Up Response Comments Box </div>	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER TWO CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER.		Action Taken Dt: 03/01/2007
Notification to: Last Update By: FOLLOW UP,USER ONE		Accepted Dt: Date: 03/01/2007

**To Access Follow Up History: By
Action Req'd By Dt > As Requestor**

User can also view request history by action required by date search as the requestor.

Step	Action
1	Select <By Action Req'd by Dt> from Follow Up History Select Option
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select <As Requestor>
5	Press <Enter>

Follow Up History

SELECT OPTION :

AS REQUESTOR
AS RESPONDER
BY PATIENT >
*BY ACTION REQ'D BY DT >AS REQUESTOR
QUIT AS RESPONDER

Or the system displays:

**To Access Follow Up History: By
Action Req'd By Dt > As Responder**

User can also view request history by action required by date search as the responder.

Step	Action
1	Select <By Action Req'd by Dt> from Follow Up History Select Option
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select <As Responder>
5	Press <Enter>

Follow Up History

SELECT OPTION:

AS REQUESTOR

AS RESPONDER

BY PATIENT >

*BY ACTION REQ'D BY DT AS REQUESTOR

QUIT

>AS RESPONDER

Follow Up-Dates Screen After selecting to view history of request *As Requestor* or *As Responder* press <Enter>, the Follow Up- Dates Screen will appear:

Step	Action
1	Enter the date range in the following fields: " From " and " To ".
2	Press <Enter>
3	Select < Search > from Action Menu
4	Press <Enter>

FOLLOW UP - DATES

View follow up records within the following date range:

Date Range - From: 03/01/2007 To: 03/01/2007

Date Range

Select One:
() Search
() Cancel
[Quit]

After pressing <Enter>, search result displays:

Step	Action
5	Select Record
6	Press <Enter>

Follow Up History	
() PIE,CHERRY	CCS#: 3860903
Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
Subject: CALL CLIENT TO SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
() PIE,CHERRY	CCS#: 3860903
Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
Subject: SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
[Quit]	

After pressing <Enter>, the Follow Up History Screen appears:

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		CMSFU-40 37431741A 4 E F/R= E Mplete
[Quit]		
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Oth Provider:		
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER THREE CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		Action Taken Dt: 03/01/2007
Notification to: Last Update By: FOLLOW UP,USER ONE		Accepted Dt: Date: 03/01/2007

Requestor's Comment

Follow Up Comments Box *Follow Up History* screen display after client selection and at the same time the *Follow Up Comments* box auto displays on screen for viewing. Press <Enter> to get rid of comment box.

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.
[Quit]

Follow Up Response Comments Box After the follow up comments box displays, an auto follow up response comments box will appear. The response comments box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.

Response#: 2 Follow Up By: FOLLOW UP,USER TWO Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. [Quit]		CMSFU-40 1741A 4 F/R= E E
Primary Addressee: E Patient Contact Phone: 0 Provider:	<div style="border: 2px solid black; padding: 10px; text-align: center;"> Follow Up Response Comments Box </div>	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER TWO CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER.		Action Taken Dt: 03/01/2007
Notification to: Last Update By: FOLLOW UP,USER ONE		Accepted Dt: Date: 03/01/2007

After pressing <Enter>, the Follow Up History Screen will appear:

FOLLOW UP HISTORY	
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE	CCS#: 3860903 CIN: 37431741A 4 MED= E F/R= E
Request Date: 03/01/2007 Follow Up ID: 0307-000019 Status: COMPLETE Requestor: FOLLOW UP,USER ONE Action Required By: 03/01/2007 Priority: ROUTINE	
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.	
Follow Up By: FOLLOW UP,USER THREE Action Taken Dt: 03/01/2007 CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.	
Notification to: Last Update By: FOLLOW UP,USER ONE	Accepted Dt: Date: 03/01/2007

Action Menu After viewing request, <F2> will bring up Action Menu.

Select One: <input type="radio"/> Print <input type="radio"/> Cancel <input type="button" value="[Quit]"/>

Command	Action
Print	Select <Print> will take user to the <i>Print Device</i> page to print and then to the <i>Follow Up History Branch Menu</i> .
Cancel	Select <Cancel> will take user back to previous page. <i>Cancel</i> will not save the request but bring user back to the <i>Follow Up History Menu</i>
Quit	Select <Quit> will take user back to screen.

Follow Up History Branch Menu The system shall send the user to the Follow Up History Branch Menu under the following condition:

- Print is selected

CMSAT	FOLLOW UP REQUEST BRANCH MENU	CMSOM-1
Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4 Gender: F DOB: 03/01/2002 LGL CO: SACRAMENTO REG= ACTIVE MED= E F/R= E		
(?) Follow Up History () Follow Up Menu		